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CURRENT STATE OF DEVELOPMENT OF LIGHT INDUSTRY IN KAZAKHSTAN

Abstract: *The article is devoted to the development of light industry in the Republic of Kazakhstan. Light industry is one of the leading industries of the world economy. Its peculiarity is a constant growth due to a steady increase in demand for its products. Therefore, in developed countries, light industry was the starting industry of the economy, and in developing countries it is a priority. The industry forms a significant share of the state budget in many countries, contributes to solving the problem of employment, improving living standards and reducing social tensions.*

Development of the domestic light industry and its transformation into a highly profitable and highly efficient sector of the economy are the most important factors of national security and meet the interests of the entire economic system of the country. Kazakhstan has the necessary conditions for the recovery of this industry. Thus, efforts to improve the competitiveness of light industry enterprises and solve the problem of import substitution are justified.

The intense competition that characterizes the light industry market requires market players to constantly strengthen their positions. In the competitive struggle, the enterprises that are maximally adapted to any changes in the market situation win, and therefore have a higher competitiveness than their rivals.

Keywords: *light industry, textiles, production, transformation, industry, competitiveness.*

Introduction

Light industry plays a serious role in the economy of each country, as it is a serious source of budgetary funds and has a significant export potential. The state of light industry affects the economic and strategic security of the country. The socio-economic importance of this industry is determined by the fact that it plays a major role in providing employment for the working population, especially women, and has an impact on human health. Light industry products are used in all spheres of human activity and in terms of consumption takes second place after food. For this reason, light industry is designated as a priority industry in Kazakhstan [1,2].

Literature review

The issues of development of light industry are covered in the works of many Kazakh scientists. The state and trends of development of Kazakhstan's light industry for the years of independence are quite widely researched in the works of L. N. Khudova and are given proposals for state regulation of the industry.

There are studies devoted to increasing the competitiveness of clothing and textile products. In particular, the impacts of the time factor on the competitiveness of these products are considered in the works of G.

S. Ukubasova. Various marketing aspects of the development of the market of light industry products are studied in the works of S. J. Asanova, N. S. Duysengulova, G. M. Shakirova, U. S. Kelesova.

Methodology and results:

Considerable attention is paid to the development of light industry in many countries of the world, since this industry has considerable socio-economic significance, providing high employment for the able-bodied population, in particular women. The importance of the industry lies in the fact that in terms of consumption it occupies the second position, second only to the consumption of food products. The main world producers of light industry products are countries such as China and India. China accounts for 40% of world cotton production, 64% of world yarn production, 41% of world textile production and 50% of world clothing production. In general, the influence of the industry on the economy of our country is insignificant relative to other sectors of the economy. Light industry has a small share in the manufacturing industry - no more than 1.2%. The industry carries out both the primary processing of raw materials and the production of finished products. It is a complex industry with more than 20 sub-sectors that can be grouped into three main groups: textile; sewing; leather, fur, shoe. The largest share in the structure of light industry is occupied by clothing.

The development of light industry in many countries of the world is given exceptionally great attention, as this industry has considerable socio-economic significance, providing high employment of the able-bodied population (in particular, women, because 85-90% of those employed in light industry - women). The importance of this industry also lies in the fact that it influences on people's health, the country's defense capability and in terms of consumption takes the second position, second only to food consumption.

The modern Kazakhstan market of light industry goods is characterized by a steady growth due to an increase in the population, an increase in demand for its products.

A feature of light industry is that it is technologically very closely is interconnected with the agro-industrial complex and the chemical industry. Consequently, competitiveness in this industry depends on investments not only in technology, research and development, but also in mechanical engineering and the chemical industry. Therefore, a key role in the competitiveness of the light industry is played by clusters. Back in 2005, the first cotton-textile cluster within which a special economic zone operates "Ontustik". For the effective operation of the cluster, a production infrastructure and a closed production cycle from the receipt of raw materials to the creation of finished products. Nevertheless, the cotton-textile cluster so far covers the needs of the country's domestic market only to a small extent. From four enterprises operating within the SEZ, only one operates at full capacity – LLP "Nimex extile". About 80% of the cluster's products - cotton threads - are exported abroad. The rest products (fabrics, yarn, bed linen, terry products) can provide only a small part of domestic demand.

It should be noted that Kazakhstan has significant potential for the development of light industry, which is due to the proximity of regions producing raw materials (Uzbekistan, Tajikistan, Turkmenistan), as well as potential capacious sales markets (Russia, Asian and European countries, Near East). Kazakhstan has the necessary conditions for creating a resource base, growing cotton, there is also a significant labor force available.

According to the State Classifier of Economic Activities, light industry in Kazakhstan is represented by three sub-branches [3]:

– Manufacture of textile products (GCEA 13);
– Manufacture of clothes (GCEA 14);
– Manufacture of leather and related products (GCEA 15).

Light industry is an integral part of the country's economy and, at the same time, is an isolated integral system of economic, technological and social relations. This industry has a very complex structure, it is characterized by close interconnection between sub-branches and a wide range of products. The light industry is characterized by a hierarchy of sub-sectors: it can distinguish leading and secondary branches.

The peculiarities of light industry are also:

– close relationship with the agro-industrial complex and the chemical industry. Therefore, the development of light industry requires investments in these sectors;

– small need for capital investments and low production costs compared to other industries. The textile industry is an exception, because the production process in it is more automated, which requires significant costs at the initial stage;

– fast returns and dynamic turnover of capital (especially in the clothing industry);
– mobility in changing the range of products produced.

In the modern world this branch is characterized by a high rating among the branches making export [4]. It has a wide range of the nomenclature of exported goods - beginning with raw materials (wool, leather, fibers, yarn and fabrics) and ending with finished products.

Analysis

The dynamics of the main indicators of the functioning of Kazakhstan's light industry are presented in Table 1. At present, the light industry of Kazakhstan does not receive proper development, despite the existing conditions and the socio-economic importance of the industry. The industry is characterized by a decrease in the number of industrial enterprises and the displacement of domestic producers from the market by foreign competitors. There is a significant reduction in the share of the industry in the GDP of the Republic - down to 0.2 and the share of the industry in the total volume of industrial production - down to 0.42 % in 2020. (These indicators were 20 % and 15.6 % respectively in Soviet period). At the same time, during the period under study there was a significant decrease in the industrial-production personnel employed in the light industry - from 14.9 to 11.6 thousand people, respectively. At the same time, the industry has lost a significant number of qualified personnel.

The average monthly wage of industry workers increased annually and amounted to 53,218 tenge in 2020. The average wage for Kazakhstan in the same year was 109,141 tenge, and it was 138,933 tenge for industry workers. Thus, the light industry is characterized by relatively low wages, which, along with difficult working conditions, makes the industry unattractive to work in. However, it is impossible to significantly increase the wages of light industry workers, as this would entail a significant increase in the cost of production.

Table 1. Key performance indicators of light industry enterprises in Kazakhstan

Indicator	2015	2016	2017	2018	2019	2020	Changes to 2020, %	
							2015	2019
Volume of industrial production, mln.	27 685	27 937	34 229	39 649	53 607	64977	234,7	121,2
Number of enterprises working in the industry	581	570	565	536	543	554	95,4	102,0
Share of production in total volume of industrial output, %	0,23	0,23	0,33	0,21	0,33	0,42	182,6	127,3
Number of personnel in core activities, thousand people	14,9	13,0	12,5	11,4	11,5	11,6	77,9	100,9
Average monthly salary of personnel of core activities, tg.	29 776	31 625	34 082	38 865	45 348	53218	178,7	117,4
Investments in fixed capital, mln. tn.	654	11 802	11 600	5 012	2 753	5730	876,1	208,1
Note - Compiled by the author on the basis of [5,6]								

1151 light industry enterprises are registered in Kazakhstan in 2020, from 554 (48.1%) are actually operating. Territorially most light industry enterprises are located in SKO (40 %), Almaty city (16 %) and Almaty region (8 %).

It can be said that the situation in the industry began to stabilize in 2019-2020: the rapid decline in production that took place in previous years was suspended; since 2018, after a steady decline, the number of enterprises in the industry and the number of employed personnel has been growing. This is due to the government measures taken to support the industry.

Experts note the positive impact on the situation of an external factor - the creation of the CU [7]. This led to the simplification of the procedure for obtaining raw materials and materials from Russia and Belarus for

Kazakhstani garment enterprises. In addition, the potential market has increased and there is an opportunity to carry out tolling operations. The strengthening of customs control at the external borders of the CU has a positive impact.

During the study period there is an increase in the volume of production of the industry; its highest value is in 2020. - 64,977 million tenge. However, against the background of inflation, the value indicators of the volume of production distort the true picture of changes.

It should be noted that, according to studies, 95% of the domestic light industry's output is produced under state and departmental orders [8]. These are mainly specialized clothing and footwear, uniforms, bedding (e.g., for hospitals), and medical goods. And only 5 % of domestic products are produced for retail sale. Consequently, the activities of Kazakhstan's light industry enterprises depend on these orders.

The textile industry is the leading sub-industry, forming 48.6 % of the volume of production of light industry of Kazakhstan. The textile industry is heterogeneous and creates various by labor intensity and degree of completeness products from processing of fibers (vegetable, animal, mineral and chemical) to production of yarn, fabrics and ready textile goods (carpets, bed-clothes, towels, etc.). This industry combines three types of production:

1. spinning production, which provides primary processing of raw materials to produce yarns and threads;
2. weaving production - creation of various fabrics with the help of weaving machines;
3. finishing production, which includes many methods of final treatment of fabrics to improve their consumer properties.

Enterprises of textile industry the number of large out of 190 and medium-sized enterprises were 39 in Kazakhstan for 2020. The industry is characterized by a reduction in the number of employed personnel for the period under consideration by 36 % (Table 2). Unprofitable functioning of enterprises of the industry is noted. Weak technical and technological equipment are serious problem of enterprises of this sub-industry. The level of wear of the equipment at the enterprises reaches 80 %, and updating of the fixed assets occurs slowly enough - on 3-4 % in a year [9].

If we consider the natural output of textile products (Appendix A), it is necessary to note the reduction in the production of many types of products. The production of cotton decreased by 20.5% in the period from 2015 to 2020, wool yarn - by 53.2%, cotton yarn - by 62.9%, fabrics - by 40.7%, bed linen - by 75%, milled and felt shoes - by 19.4%. At the same time, there is an increase in the production of such items as sheep's wool (42.7%), cotton yarn (12.9%), fabrics (7.4%), bed linen (53.6%), felt (24.9%). There is a significant increase in the production of carpets and carpet products more than 27 times in 2020. This indicates the stabilization of the work of the corresponding productions over the last year. Studying the dynamics of woolen yarn, milled and felt footwear production, it can be assumed that their production may stop at all.

Table 2. Key performance indicators of textile industry enterprises

Indicator	2015	2016	2017	2018	2019	2020	Changes to 2020 y., %	
							2015	2019
Volume of industrial production, mln. tg.	14429	13508	18416	18080	23490	31588	218,9	134,5
Number of enterprises working in the industry	176	172	187	190	189	190	108,0	100,5
Number of personnel in core activities, thousand.	8,9	7,6	6,4	5,8	5,7	5,7	64,0	100,0
Average monthly salary of the personnel of core activity, tenge	29 206	31 816	35 565	38 341	43 595	47814	163,7	109,7
Profit (loss) before taxation, mln. tg.	-2 040	-6 070	-2 900	-1 956	-11578	-16017	785,1	138,3

Indicator	2015	2016	2017	2018	2019	2020	Changes to 2020 y., %	
							2015	2019
Profitability, %	-7,3	-25,7	-11,1	-8,9	-28,1	-41	561,6	145,9
Note - Compiled by the author on the basis of data [5,6]								

The production of textile products such as linen fabrics, fabrics from man-made fibers, karakul has completely stopped over the past five to seven years in Kazakhstan. However, the production of man-made fibers resumed, since 2020 (978.9 thousand square meters were produced [10]). Also since 2014, Kazakhstan resumed the production of some blended fabrics. However, their production covers the needs of apparel production by only 15% [11]. In 2015, production at the largest textile enterprise - the Almaty cotton plant - stopped.

Cotton is the backbone of Kazakhstan's textile industry, and a reduction in its production could be disastrous for the industry.

Regional distribution of textile productions is as follows. Production of cotton and cotton yarn are completely concentrated in SKO. This region leads in the production of all kinds of fabrics, as well as carpets and rugs. Sheep wool is mainly produced in SKO (60,5 %), Zhambyl (34,6 %) and Almaty region (3,9 %). Bed-clothes are mainly produced in Almaty city (45,9 %), Pavlodar region (14,6 %), South-Kazakhstan region (9,7 %). Felts are produced in East-Kazakhstan region (45.8 %), Akmola region (24.1 %), West-Kazakhstan region (113.3 %).

Among large textile enterprises of Kazakhstan it is possible to note the following.

Alliance Kazakh Russian Textile LLP, specializes in the production of severe fabrics in Shymkent; NimexTextile LLP is a large textile factory producing cotton yarn and fabrics. It is located in South Kazakhstan Region, on the place of raw material base. Spinning and weaving factory SouthTextilineKZ LLP, specializing in the production of severe satin, towel (waffle), and terry fabrics. We should also note the following textile enterprises of Kazakhstan: Akzhip JSC, Almaty; AlmatyCottonPlant LLP, Almaty; Tekhnotkan Textile Company LLP, Kostanay Spinning and Knitting Factory LLP, Kostanay; PKF KazakhstanTekstiLine LLP, Almaty, and others.

A textile cluster was created in 2005 for the development of textile and garment production in South Kazakhstan Region, within which the special economic zone "Ontustik" functions. Four textile enterprises operate within the cluster: "Khlopkoprom-Tselulosa" LLP, "OxyTextile" LLP, "Yesenzhol-Nazar" LLP, JSC "Yutex-KZ". These enterprises are located at the place where the cotton raw material is grown. The task of the cotton-textile cluster is to grow the domestic consumer textile market and create export-oriented production.

Conclusions and suggestions.

Having studied the textile sub-industry of Kazakhstan, we can draw conclusions:

– unprofitable functioning of enterprises of the industry;

– a tendency to decrease the index of physical volume of production;

– uneven distribution of enterprises by regions of the country, localization of processing enterprises at the place of production of raw materials;

– predominance of raw materials in the nomenclature of production;

– ambiguous dynamics of production: production of some types of products is reduced, others are increased, and production of some types of products was resumed in the last year after temporary suspension.

It is possible to note some weaknesses of the branch. These are, first of all, a low level of technical equipment and poor development of R&D; low quality of the produced raw materials, which is caused by objective (soil fertility, climatic conditions) and subjective (failure to comply with cotton cultivation and harvesting technologies) factors [12].

Conclusion

Thus, based on the study of the main indicators of the textile industry, we can state that this industry needs to be restored. Solving the problems of the textile industry is important to maintain the clothing industry of the country, as the first industry provides a raw material base for the production of clothing. Not only the quantity, but also the quality of created textile materials is important, because low-quality fabrics, threads increase losses from rejects in garment production. In addition, the quality of materials affects the competitiveness of the garments produced from them. Restoration of the textile industry of Kazakhstan will require time and significant investment, since this industry is particularly automated compared to other sub-sectors of light industry, requires highly qualified workers and knowledge of modern production technologies.

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ҚАЗАҚСТАНДАҒЫ ЖЕҢІЛ ӨНЕРКӘСІПТІҢ ДАМУЫНЫҢ ҚАЗІРГІ ЖАҒДАЙЫ

Аңдатпа: *Мақала Қазақстан Республикасындағы жеңіл өнеркәсіпті дамытуға арналған. Жеңіл өнеркәсіп - әлемдік экономиканың жетекші салаларының бірі. Оның ерекшелігі - оның өніміне сұраныстың тұрақты өсуіне байланысты тұрақты өсу. Сондықтан дамыған елдерде жеңіл өнеркәсіп экономиканың бастапқы саласы болды, ал дамушы елдерде бұл басымдыққа ие. Бұл сала көптеген елдерде мемлекеттік бюджеттің едәуір бөлігін құрайды, жұмыспен қамту мәселесін шешуге, халықтың өмір сүру деңгейін жақсартуға және әлеуметтік шиеленісті төмендетуге ықпал етеді.*

Отандық жеңіл өнеркәсіпті дамыту және оны экономиканың жоғары табысты және жоғары тиімді секторына айналдыру ұлттық қауіпсіздіктің маңызды факторлары болып табылады және елдің бүкіл экономикалық жүйесінің мүдделеріне сәйкес келеді. Қазақстанда бұл саланы қалпына келтіру үшін қажетті жағдайлар бар. Осылайша, жеңіл өнеркәсіп кәсіпорындарының бәсекеге қабілеттілігін жоғарылату және импортты алмастыру мәселесін шешу жөніндегі күш -жігер ақталды.

Жеңіл өнеркәсіп нарығын сипаттайтын қарқынды бәсекелестік нарық ойыншыларынан өз позицияларын үнемі нығайтуды талап етеді. Бәсекелестік күресте нарықтық жағдайдың кез келген өзгерістеріне барынша бейімделген кәсіпорындар жеңеді, сондықтан бәсекелестік қабілеті олардың бәсекелестеріне қарағанда жоғары.

Түйін сөздер: *жеңіл өнеркәсіп, тоқыма, өндіріс, трансформация, өнеркәсіп, бәсекеге қабілеттілік.*

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ТЕКУЩЕЕ СОСТОЯНИЕ РАЗВИТИЯ ЛЕГКОЙ ПРОМЫШЛЕННОСТИ В КАЗАХСТАНЕ

Аннотация: *Статья посвящена развитию легкой промышленности в Республике Казахстан. Легкая промышленность - одна из ведущих отраслей мировой экономики. Его особенность - постоянный рост за счет неуклонного увеличения спроса на его продукцию. Поэтому в развитых странах легкая промышленность была стартовой отраслью экономики, а в развивающихся странах - приоритетной. Промышленность формирует значительную долю государственного бюджета во многих странах, способствует решению проблемы занятости, повышению уровня жизни и снижению социальной напряженности.*

Развитие отечественной легкой промышленности и превращение ее в высокодоходный и высокоэффективный сектор экономики являются важнейшими факторами национальной безопасности и отвечают интересам всей экономической системы страны. В Казахстане есть необходимые условия для восстановления этой отрасли. Таким образом, усилия по повышению конкурентоспособности предприятий легкой промышленности и решению проблемы импортозамещения оправданы.

Таким образом, острая конкуренция, характерная для рынка легкой промышленности, требует от участников рынка постоянного укрепления своих позиций. В конкурентной борьбе побеждают предприятия, максимально адаптированные к любым изменениям рыночной ситуации, а значит, более конкурентоспособные, чем их конкуренты.

Ключевые слова: *легкая промышленность, текстиль, производство, трансформация, индустрия, конкурентоспособность.*